LETORT TRUST

Job Title: Family Wealth Relationship Manager

Location: Mechanicsburg, PA (In person)

Join a Team Where Excellence Meets Purpose

At LeTort Trust, we pride ourselves on fostering a culture of integrity, collaboration, and continuous growth. More than just a financial institution, we're a close-knit team dedicated to making a difference in the lives of our clients and the community we serve. As a boutique trust company, we combine industry-leading expertise with a personal, relationship-focused approach that prioritizes innovation, collaboration, and client success.

Our team is built on a foundation of mutual respect, transparency, and autonomy, creating an inclusive and dynamic environment where professionals feel supported and empowered. We emphasize work-life balance, recognizing that a healthy, fulfilled team is essential to delivering exceptional service. At LeTort Trust, you'll have the opportunity to lead with purpose, innovate with freedom, and shape both your career and the future of our company.

Here, you'll work alongside a collaborative leadership team that values your insights, encourages creativity, and supports your professional growth. In this role, you will have the unique ability to:

- **Influence Strategic Direction:** Work at the heart of decision-making, defining and implementing strategies that fuel growth and client success.
- **Lead with Autonomy:** Enjoy the freedom to innovate and make impactful decisions.
- **Create Meaningful Impact:** See the immediate results of your efforts while shaping the organization's trajectory.
- **Collaborate and Build Relationships:** Partner with a team that values transparency and a shared vision of excellence.

We offer competitive compensation, professional development opportunities, a comprehensive benefits package, and the chance to make a meaningful impact on our clients' financial and legacy planning. At LeTort Trust, excellence is recognized, contributions are celebrated, and leaders thrive. Your career here isn't just a job, it's an opportunity to leave a legacy while driving growth and innovation in a mission-driven organization.

Job Description:

This position will be responsible for building, developing, and managing Family Wealth Relationships for current and future clients of LeTort Trust. The candidate should possess a strong knowledge of investments, and the financial service industry coupled with experience in client management. The candidate must be a strong independent thinker that can collaborate well in a team environment. The candidate will be professional, have strong client service and communication skills, be detail oriented and able to handle multiple tasks accurately and in a timely manner. Candidates will be required to learn proprietary software applications unique to the industry.

Key Responsibilities:

- Manage client relationships through proactive service and delivering high-value management of their financial affairs.
- Act as a true fiduciary to our clients and adhere to compliance standards applicable to the financial services industry.
- Respond to client inquiries, with ability to research and resolve client issues.
- Organize and coordinate all client's financial information.
- Collaborate with internal teams and external advisors to deliver multidisciplinary client solutions.

Qualifications:

- A genuine interest in servicing and caring for people
- Bachelor's degree in Business, Finance, Accounting, or related degree
- CFP credentials, preferred but not required
- Knowledge of investments and financial industry
- Excellent written, oral, and interpersonal communication skills
- Strong skills with Microsoft Office (including Excel and PowerPoint)

How to Apply:
Submit your resume and cover letter to hr@letorttrust.com with "Family Wealth Relationship Manager" in the subject line.

LeTort Trust was formed as an Independent Trust Company to create a highly specialized wealth management firm combining the investment resources of a large firm with the highly personalized service found in a boutique wealth management company. LeTort Trust has been serving the central PA market since 2002, providing business owners, executives and individuals with a wealth of experience in retirement plan services, investment management and personal trust industries. For further information on LeTort Trust, please visit our website at www.letorttrust.com.

LeTort Trust is an Equal Opportunity Employer and considers all qualified applicants regardless of race, gender, color, religion, national origin, age, sexual orientation, gender identity, disability, veteran status or other classification protected by law.